North Carolina COVID-19 Vaccine Management System

CVMS Provider Portal Recipient Point of Care User Guide

Version 3

January 15, 2021

NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**

If you have any questions, issues or requests, please go to the CVMS Help Desk Portal* at
https://ncgov.servicenowservices.com/csm_vaccine

* On the home page of the CVMS Help Desk Portal, select the "**Vaccine Provider**" option to submit your question, issue, or request.

Providers that are first time users of the CVMS Help Desk Portal will have to follow the steps below:

1. Register for an account on the portal by clicking 'Register' in the top right-hand corner
2. Populate your first name, last name, business e-mail, and your registration code

    NOTE: The registration code is your Provider PIN (i.e., NCA650001), which can be found on the packing lists received with your Vaccines For Children shipments, or in the top right-hand corner of a wasted / expired report generated from the North Carolina Immunization Registry (please add "NCA" to the front of the six-digit PIN#)

    For providers who are not enrolled or may not have a Provider PIN, you may use the following generic Provider PIN to register: VAC2021

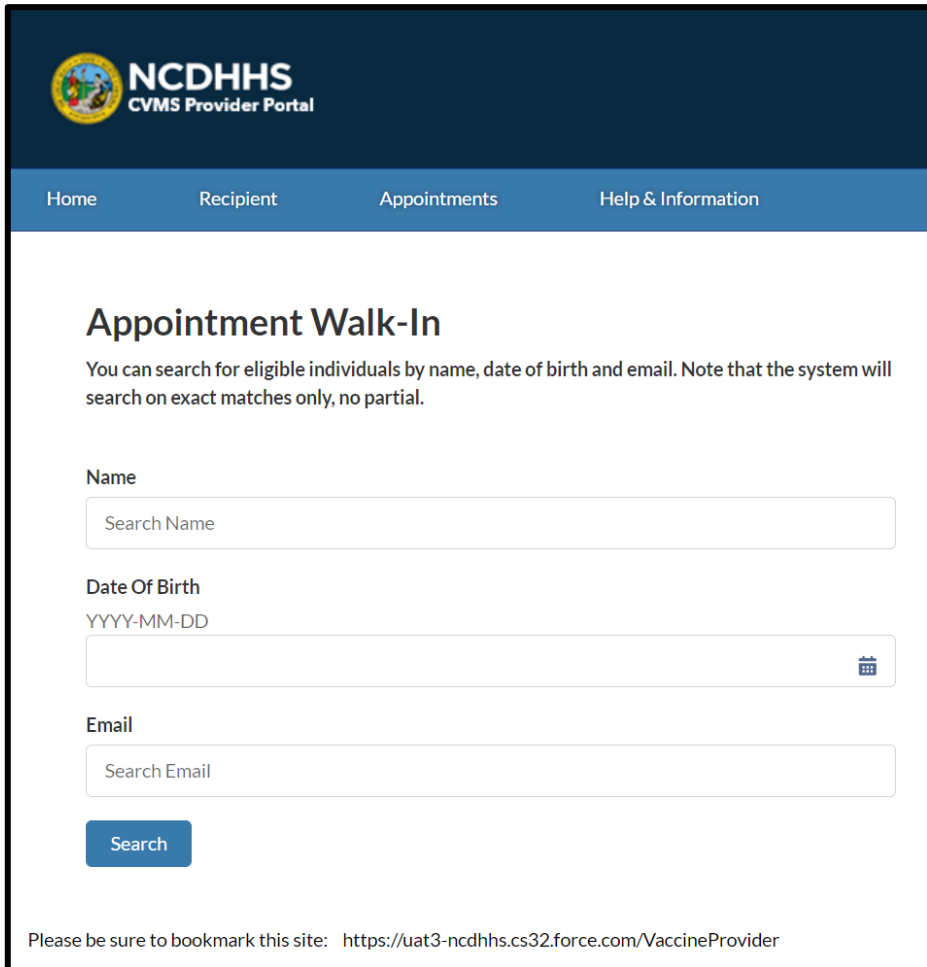3. You will receive an e-mail with your username and temporary password to log into the portal

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Recipient Point of Care Overview & Process

Overview

The Recipient Point of Care process typically involves:

1. Verifying the Recipient's identity
2. Verifying Recipient's Eligibility to receive the COVID-19 vaccine
3. Creating an Appointment Booking for the Recipient via the Appointment Walk-In Tool
4. Creating a Recipient Record on behalf of a Recipient
5. Completing a COVID-19 Vaccination (Health) Questionnaire on behalf of a Recipient

It is important to note that to document a Recipient Vaccine Administration in CVMS, the recipient **MUST BE** registered in CVMS. Registered in CVMS means the Recipient Record is found in CVMS, and the **COVID-19 Vaccination (Health) Questionnaire** is completed.

This set of activities can be performed by a user with a **HEALTHCARE LOCATION MANAGER** profile or a **HEALTHCARE PROVIDER** profile.

You will also need to:
- Use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers
- Log into the CVMS Provider portal at https://covid-vaccine-provider-portal.ncdhhs.gov using your NCID username and password.

Now, let's get started!

Key Terms

Priority Tier

Since there is initially a very limited supply of COVID-19 vaccines, **North Carolina has implemented a risk-based prioritization approach** based on guidance from the National Academy of Medicine, the CDC's Advisory Committee Immunization Practice, and the NC Institute of Medicine.

The **NC population is divided into multiple Priority Tiers based on an individual's occupation, medical history, and age.**
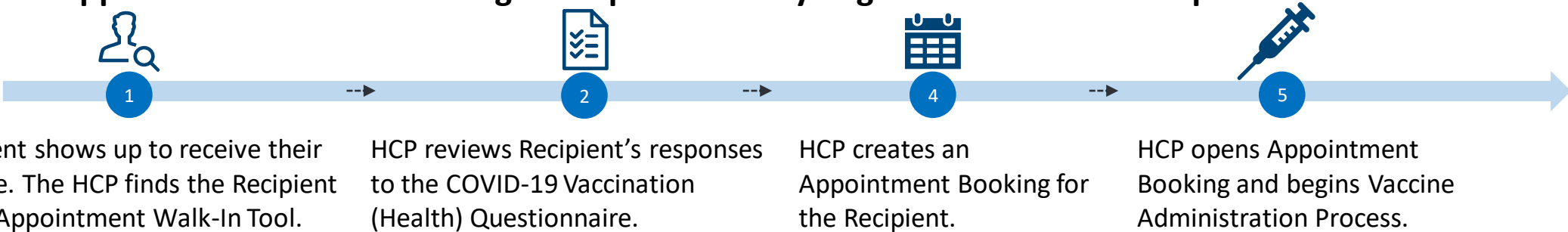
Note: Eligibility requirements may be adjusted in the future by the NC Immunization Branch.

Eligibility

A Recipient's **Eligibility status is determined by the Priority Tier they fall under** as determined by the NC Immunization Branch. Eligibility requirements may be adjusted in the future by the NC Immunization Branch.
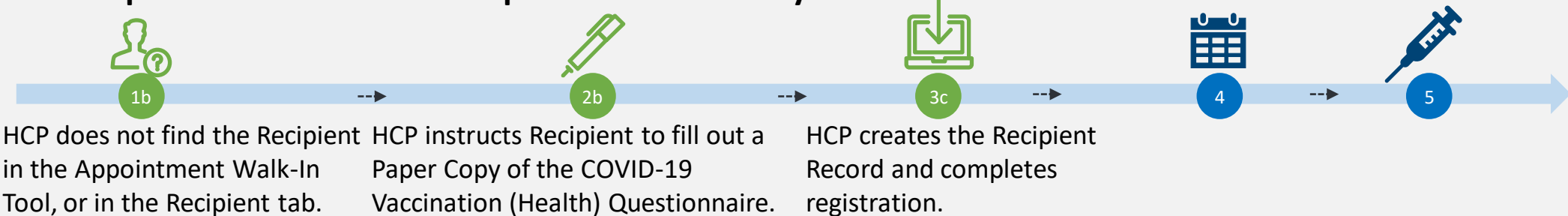
Visit https://covid19.ncdhhs.gov/findyourspot **for the latest information on Priority Tiers and Eligibility.**

Appointment Walk-In Booking Process

Standard Appointment Walk-in Booking – Recipient Already Registered on CVMS Recipient Portal

1 Recipient shows up to receive their Vaccine. The HCP finds the Recipient in the Appointment Walk-In Tool.

2 HCP reviews Recipient's responses to the COVID-19 Vaccination (Health) Questionnaire.

4 HCP creates an Appointment Booking for the Recipient.

5 HCP opens Appointment Booking and begins Vaccine Administration Process.

Exception 1 – What if the Recipient Record is not yet Created?

1b HCP does not find the Recipient in the Appointment Walk-In Tool, or in the Recipient tab.

2b HCP instructs Recipient to fill out a Paper Copy of the COVID-19 Vaccination (Health) Questionnaire.

3c HCP creates the Recipient Record and completes registration.

4

5

Exception 2 – What if the Recipient Record is Created, but Recipient did not Complete Registration?

1c The recipient isn't found in in the Appointment Walk-In Tool, BUT is found in the Recipient tab.

2b

3d HCP completes registration.

4

5

Standard Appointment Walk-In Booking
Recipient Already Registered on CVMS Recipient Portal

Step 1 of 6: Navigate to the CVMS Provider Portal Home Page

From the **HOME PAGE**, you will complete a simple **SEARCH** using the **APPOINTMENT WALK-IN TOOL** on your home page before the Recipient receives the COVID-19 vaccine.

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Tips

You will **NOT** be able to schedule COVID-19 vaccine appointments in advance for Recipients in the CVMS Provider Portal.

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

Walkin Example

Date Of Birth

YYYY-MM-DD

Email

Search Email

Search

To get started, you will search for the **RECIPIENT** to help you **IDENTIFY** and **REVIEW ELIGIBILITY STATUS** before creating their appointment.

1. Enter the Recipient's **NAME, DATE OF BIRTH** and / or **EMAIL ADDRESS** in the Appointment Walk-in Tool located on the Home Page

2. Only one field is required to search

3. Click **SEARCH**

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Tips

To narrow your Recipient search results, you can enter all search fields to help you find the Recipient faster.

Note: to document a Recipient Vaccine Administration in CVMS, the recipient MUST BE registered in CVMS. Registered in CVMS means the Recipient Record is created, and the COVID-19 Vaccination (Health) Questionnaire is completed.

Although the Recipient's Eligibility status is determined by their responses to specific questions and other factors, __the HCP can use its discretion__ to administer a COVID-19 vaccine to a Recipient with an Eligibility status of not eligible if the HCP determines that the Recipient falls under a currently eligible Priority Tier group (in accordance with the CDC and NC DHHS prioritization of COVID-19 vaccine recipients).

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After clicking search, you will see your **RECIPIENT SEARCH RESULTS** populate underneath the Appointment Walk-In Tool. You will be able to view the Recipient's **NAME, DATE OF BIRTH (DOB), EMAIL, PRIORITY TIER, ELIGIBILITY STATUS** and **VACCINE DOSE STATUS.**

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Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

Walkin Example

Date Of Birth

YYYY-MM-DD

Email

Search Email

Search

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Jan 19, 21, 10:59 AM	Test-1.4 Scenario145 Dose 1 Scheduled	00112065	Clinic ABC Loc 1

Search Results

Select a location: Clinic ABC Loc 1   Appointment Booking

Name	DOB	Email	Priority	Eligibility	Vaccine Dose Status
Walkin Example	1955-12-12	walkinexample@mailinator.c...	Phase 1a	Approved	Registered
Walkin Example	1975-08-07	jon.w.example@mailinator.co...	Phase 1a	Approved	Registered

Please be sure to bookmark this site: https://uat3-ncdhhs.cs32.force.com/VaccineProvider

On the same page, you can also confirm **RECIPIENT ELIGIBILITY**. If a Recipient's Eligibility status is **APPROVED**, it means the system has determined they are in a Priority group that is currently eligible to **RECEIVE THE COVID-19 VACCINE.** However, if the Recipient's Eligibility status is **NOT APPROVED**, the system will still allow you to create an **APPOINTMENT BOOKING** for that Recipient. Therefore, if your knowledge of the you may move forward and vaccinate the Recipient.

Once you confirm the Recipient is eligible to receive the COVID-19 vaccine, you will be able to continue creating the appointment booking for the Recipient.

1. Locate **ELIGIBILITY STATUS** for the Recipient

2. Confirm that Eligibility is **APPROVED**

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Search Results

Select a location Clinic ABC Loc 1 ▼   Appointment Booking

Name	∨	DOB	∨	Email	∨	Priority	∨	Eligibility	∨	Vaccine Dose Status	∨
● Walkin Example		1955-12-12		walkinexample@mailinator.c...		Phase 1a		Approved		Registered	
○ Walkin Example		1975-08-07		jon.w.example@mailinator.co...		Phase 1a		Approved		Registered	

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Step 5 of 6: Create the Appointment Booking

Once you verified the Recipient's record and Eligibility status, you can officially **CREATE THEIR APPOINTMENT BOOKING**.

1. In your **SEARCH RESULTS,** select the **CORRECT RECIPIENT RECORD**

2. Click **APPOINTMENT BOOKING**

3. A message confirming the appointment booking was created will appear, click **OK**

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Tips

Confirm the Recipient's Eligibility status before booking the appointment.

Search Results

	Name	∨	DOB	∨	Email	∨	Priority	∨	Eligibility	∨	Vaccine Dose Status	∨
●	Walkin Example		1955-12-12		walkinexample@mailinator.c...		Phase 1a		Approved		Registered	
○	Walkin Example		1975-08-07		jon.w.example@mailinator.co...		Phase 1a		Approved		Registered	

Select a location: Clinic ABC Loc 1 ▼   Appointment Booking

Note: For users with access to more than one location, use the drop-down menu to select which location the Recipient is getting their Appointment Booking. Users with access to only one location can leave the drop-down menu as-is.

Search Results

Select a location ▼   Appointment Booking

Crimson Skies - Location 3
Crimson Skies - Location 2
Crimson Skies - Location 1

	Name	∨	DOB	∨	Email	∨	Priority	∨	Eligibility	Vaccine Dose Status	∨
○	Test1212 Recipient99400				somnathqa05+v891@gmail.com		Phase 1b			Dose 1 Canceled	
○	Ttt TeSt		1959-01-06				Phase 4		Not Approved	Dose 1 Scheduled	
●	Michelle Test1		1990-01-05				Phase 2 Group 3		Not Approved	Dose 1 Scheduled	

Step 6 of 6: Review the Appointment Booking

The appointment that is created will be available to you under **TODAY'S APPOINTMENTS**.

To begin the **VACCINE ADMINISTRATION** process, the Recipient will require an **APPOINTMENT BOOKING.**

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+ To know more about the **VACCINE ADMINISTRATION** process, please reference the CVMS Provider Portal Vaccine Administration User Guide.

Exception 1 – What if the Recipient Record is not yet Created?

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1. From the **HOME PAGE**, enter the Recipient's name in the **APPOINTMENT WALK-IN TOOL**

2. If the Recipient's record does not appear, this means that the Recipient is either not registered or does not have a record

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To see if the Recipient has a record, but is not yet registered, search for them in the **RECIPIENT** tab.

1. Navigate to the **RECIPIENT** tab

2. Enter the Recipient's **NAME** (first name and last name) in the search bar

3. To help narrow results, enter the Recipient's **DATE OF BIRTH** in the appropriate field (Note: The **DATE OF BIRTH** field can only be used if there is a name in the search bar, and cannot be used by itself)

4. Click **SEARCH**

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Tips

Enter at least three characters to receive results.

A Vaccine Administration cannot be documented in CVMS if the recipient is not registered in CVMS.

Registration is complete when a Recipient's answers to the **COVID-19 Vaccination (Health) Questionnaire** are entered into the system. This can occur in the **CVMS RECIPIENT PORTAL** or the **CVMS PROVIDER PORTAL.**

1. After clicking search, the **RECIPIENT SEARCH RESULTS** will populate in either the **RECIPIENTS WITHIN CVMS** section, or the **RECIPIENTS FROM LONG TERM CARE FACILITIES** section

2. If there are **NO** results in the **RECIPIENTS WITHIN CVMS** section, or the **CORRECT** Recipient cannot be found, this indicates that the Recipient does not have a record in CVMS, and must be created on-site

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Tips

For more information on how to handle Recipient search results that appear in the **RECIPIENTS FROM LONG TERM CARE FACILITIES** section, please see the **WHAT IF THE RECIPIENT RECEIVED THEIR FIRST DOSE THROUGH A PARTNERING PHARMACY** portion of this User Guide.

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Step 4 of 9: Ask the recipient to fill a paper copy of the COVID-19 Vaccination Questionnaire

1. Instruct the Recipient to fill out a paper copy of the **COVID-19 Vaccination (Health) Questionnaire** (the PDF is available under the **HELP & INFORMATION TAB or on the NC Immunization Branch website labeled as CVMS RECIPIENT REGISTRATION:** https://immunize.nc.gov/providers/covid-19training.htm)

2. Give the Recipient a few minutes to fill the form

3. Click the **CREATE NEW RECIPIENT** button on the **RECIPIENT** tab to bring up a pop-up form

Audience

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Tips

Print several copies of the **COVID-19 Vaccination (Health) Questionnaire** to keep on hand to provide Recipients.

Step 5 of 9: Create the Recipient Record

Use the Recipient's **COVID-19 Vaccination (Health) Questionnaire paper form** to fill in required fields

1. If the recipient cannot provide an email address, select the **NO EMAIL PROVIDED** checkbox. Please inform the recipient that in the absence of an email address, it will not be possible for them to connect to the CVMS Recipient portal and view their Proof of Vaccination. You can however access this from the CVMS Provider Portal and print it for them if needed

2. The **BIRTHDATE** is an important field as the Eligibility Tier group is determined in part by the recipient's age

3. If the **EMPLOYER** is already registered in CVMS, type the name of the employer. Otherwise just select the **INDUSTRY** that the Recipient works in. Eligibility tier groups are also determined in part by that selection

4. Select **CREATE RECIPIENT**

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Tips

Reference section **Understanding How Recipient Eligibility Status is Determined** for more details on Priority Tier Groups.

If the recipient is **retired** or **unemployed**, do not select an Employer, and select **OTHER** in **INDUSTRY** field.

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Once the Recipient is created, a new browser tab will open for you to fill out the Recipient's **COVID-19 Vaccination (Health) Questionnaire** using the paper copy the Recipient filled out.

1. Check the box to confirm that the Recipient has completed the certification statement

2. Click **NEXT**

3. Enter demographic information from the paper copy of the **COVID-19 Vaccination (Health) Questionnaire**

4. If anything is unclear on the paper copy, ask the Recipient for clarification before entering the information into CVMS

5. Click **NEXT**

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1. Enter the number of chronic conditions marked by the Recipient on **COVID-19 Vaccination (Health) Questionnaire**

2. Select the corresponding button on the medical background page **NONE**, **1**, or **2 OR MORE**

3. Select **NEXT**

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Tips

There is no requirement to confirm a chronic condition. However, note that the answer to this question is used in part to determine the recipient's Eligibility Tier Group. Reference section **UNDERSTANDING HOW RECIPIENT ELIGIBILITY STATUS IS DETERMINED** for more details.

Review the information you entered from the paper copy of the **COVID-19 Vaccination (Health) Questionnaire**.

1. Validate that the information entered matches the information given by the Recipient

2. To make changes, select **PREVIOUS**

3. If the information is correct, select **SUBMIT**

Audience

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Tips

If you have any questions about what a Recipient wrote, ask them for clarification before submitting.

After submitting the COVID-19 Vaccination (Health) Questionnaire, you will not be able to go back and edit the Recipient's answers.

Your registration is complete

We received your COVID-19 vaccine enrollment. Based on your information, you have been assigned to priority tie[Phase 4]nd will potentially be eligible to receive the vaccine during a future phase. When available, we will notify you to schedule your appointment with a local provider.
For vaccine updates, visit here.

Person Account
Jane Doe

Eligibility Status	Priority	Recipient Dose Status
Not Approved	Phase 4	Registered

1. The **REGISTRATION IS COMPLETE**

2. **ELIGIBILITY** appears on the confirmation screen

3. If the Recipient belongs to a Priority Tier Group currently eligible for vaccination, the message will display **YOU ARE ELIGIBLE TO RECEIVE A VACCINE**

4. Otherwise, the Recipient's **PRIORITY TIER** will be visible on the confirmation screen as well as the Recipient tab

Vaccine Registration for: Jon NewRecipient

Introduction → Contact and Demographic Detail → Medical Details → Confirmation

Your enrollment is complete!

You are eligible to receive a vaccine.

Based on the questionnaire you are potentially eligible to receive a vaccine. Please contact your Employer or Health Care Provider to schedule an appointment.

Audience

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Tips

If the Recipient informs you that their health information is **NOT CORRECT**, ask the Recipient to **UPDATE** their information (e.g., responses to COVID-19 Vaccination (Health) Questionnaire) in the **CVMS RECIPIENT PORTAL.**

You will **NOT** be able to **EDIT** the Recipient's profile.

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Finalize Walk-In Appointment Booking

Now that the Recipient has been registered successfully, you can return to the **HOME** page and follow the Standard **APPOINTMENT WALK-IN** Booking process.

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Exception 2 – What if the Recipient Record is Created, but Recipient did not Complete Registration?

The process to register an existing Recipient begins on the **HOME PAGE.** You will verify that the Recipient's name does not appear in the **APPOINTMENT WALK-IN TOOL**. Similar to the previous scenario, this means that the Recipient is either not registered or does not have a record.

Audience

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| Healthcare Location Manager |

Tips

If the Recipient does appear in the **APPOINTMENT WALK--IN TOOL**, refer to the **RECIPIENT APPOINTMENT BOOKING** section of this User Guide.

Step 2 of 7: Search for the Recipient

To check for the Recipient's record, search for them in the **RECIPIENT** tab.

1. Navigate to the **RECIPIENT** tab

2. Enter the Recipient's **NAME** (first name and last name) in the search bar

3. To help narrow results, enter the Recipient's **DATE OF BIRTH** in the appropriate field (Note: The **DATE OF BIRTH** field can only be used if there is a name in the search bar, and cannot be used by itself)

4. Click **SEARCH**

Audience

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Tips

You will not be able to log a Recipient vaccine administration if the Recipient is not registered in CVMS.

Registration is complete when a Recipient's answers to the COVID-19 Vaccination (Health) Questionnaire are entered into the system.

Step 3 of 7: Verify the Recipient's Registration

After clicking search, the **RECIPIENT SEARCH RESULTS** will populate in the **RECIPIENTS WITHIN CVMS** section. You will be able to verify that the Recipient has a record but is not yet registered.

1. Click on the Recipient's **NAME** to open the Recipient's record

2. Verify that the Recipient is not yet registered by confirming their **RECIPIENT DOSE STATUS** is blank

3. If the Recipient is not yet registered, select the **REGISTER** button

Step 4 of 7: Enter the Recipient's Demographic Information

Just as when registering a new Recipient, a new browser tab will open for you to fill out the Recipient's **COVID-19 Vaccination (Health) Questionnaire.**

1. Have the Recipient fill out a paper copy of the **COVID-19 Vaccination (Health) Questionnaire** (the PDF is available under the **HELP & INFORMATION TAB or on the NC Immunization Branch website** **https://immunize.nc.gov/providers/covid-19training.htm**)

2. Click **NEXT**

3. Enter demographic information from the paper copy of the **COVID-19 Vaccination (Health) Questionnaire**

4. If anything is unclear on the paper copy, ask the Recipient for clarification before entering the information into the questionnaire

5. Click **NEXT**

Audience

Healthcare Provider

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Tips

Print several copies of the **COVID-19 Vaccination (Health) Questionnaire** to keep on hand for other Recipients.

Step 5 of 7: Enter the Recipient's Medical Information

1. Enter the number of chronic conditions marked by the Recipient on **COVID-19 Vaccination (Health) Questionnaire**

2. Select the corresponding button on the medical background page **NONE**, **1**, or **2 OR MORE**

3. Select **NEXT**

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Tips

There is no requirement to confirm a chronic condition. However, note that the answer to this question may be used to determine the recipient's Eligibility Tier Group. Reference section **UNDERSTANDING HOW RECIPIENT ELIGIBILITY STATUS IS DETERMINED** for more details.

Review the information you entered from the paper copy of the Recipient's **COVID-19 Vaccination (Health) Questionnaire**.

1. Review that the information entered matches the information given by the Recipient

2. To make changes, select **PREVIOUS**

3. If the information is correct, select **SUBMIT**

Audience

Healthcare Provider

Healthcare Location Manager

Tips

If you have any questions about what a Recipient wrote, ask them for clarification before submitting.

After submitting the COVID-19 Vaccination (Health) Questionnaire, you will not be able to go back and edit the Recipient's answers.

Your registration is complete

We received your COVID-19 vaccine enrollment. Based on your information, you have been assigned to priority tier **Phase 4** and will potentially be eligible to receive the vaccine during a future phase. When available, we will notify you to schedule your appointment with a local provider.
For vaccine updates, visit here.

Person Account
Jane Doe

Eligibility Status	Priority	Recipient Dose Status
Not Approved	Phase 4	Registered

1. The **REGISTRATION IS COMPLETE**

2. **ELIGIBILITY** appears on the confirmation screen

3. If the Recipient belongs to a Priority Tier Group currently eligible for vaccination, the message will display **YOU ARE ELIGIBLE TO RECEIVE A VACCINE**

4. Otherwise, the Recipient's **PRIORITY TIER** will be visible on the confirmation screen as well as the Recipient tab

Vaccine Registration for: Jill NotRegistered

Introduction → Contact and Demographic Detail → Medical Details → Confirmation

Your enrollment is complete!
You are eligible to receive a vaccine.

Based on the questionnaire you are potentially eligible to receive a vaccine. Please contact your Employer or Health Care Provider to schedule an appointment.

Audience

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Tips

If you determine that the recipient is eligible, then you can procced with administering and documenting in CVMS the vaccination of the recipient regardless of their **ELIGIBILTY** status in CVMS.

Finalize Walk-In Appointment Booking

Now that the recipient has been registered successfully, you can return to the **HOME** page and follow the standard **APPOINTMENT WALK-IN** Booking process.

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What if the Recipient received their first dose through a partnering pharmacy with Long-Term Care facilities ?

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Step 1 of 5: Navigate to the Recipient Tab

The federal government has an agreement with pharmacy partners (CVS & Walgreens) to vaccinate Long Term Care facilities and Nursing homes residents or staffers. Those pharmacy partners do not use CVMS, but instead upload their vaccination records directly to the CDC.

Even if a Recipient received their first dose through a pharmacy partner, they could receive their second dose from a healthcare provider enrolled in CVMS like you. To vaccinate them, you will have to locate and verify the first dose record before administering a second dose within CVMS.

1. Begin by navigating to the **RECIPIENT** tab from the CVMS Provider Portal Home Page.

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To check for the Recipient's record, search for them in the **RECIPIENT** tab.

1. Enter the Recipient's **NAME** (first name and last name) in the search bar

2. To help narrow results, enter the Recipient's **DATE OF BIRTH** in the appropriate field (Note: The **DATE OF BIRTH** field can only be used if there is a name in the search bar, and cannot be used by itself)

3. Click **SEARCH**

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Tips

It's possible that the Recipient has a result in both the **RECIPIENTS WITHIN CVMS** and the **RECIPIENTS FROM LONG TERM CARE FACILITIES** sections. The first record in the CVMS section means they were uploaded by an eligible organization.

The record in the second section means they received their first dose through a Pharmacy Partner.

Step 3 of 5: Search for the Recipient

1. Locate the **CORRECT** Recipient in the **RECIPIENTS FROM LONG TERM CARE FACILITIES** section of the search results

2. The Recipient may also appear as a search result in the **RECIPIENTS WITHIN CVMS** section. In that instance, note the **RECIPIENT DOSE STATUS** to see if CVMS has a record of the Recipient's first dose

3. Click on the Recipient's name in the **RECIPIENTS FROM LONG TERM CARE FACILITIES** section

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Clicking the Recipient's name in the **RECIPIENTS FROM LONG TERM CARE FACILITIES** section will open the Recipient's **PHARMACY RECIPIENT** record. This record has no connection to a CVMS Recipient Record and is used only as reference data.

1. Scroll down in the **PHARMACY RECIPIENT** record to determine if and when the Recipient received their first dose

2. If the Recipient is eligible for their second dose, use the information in the **PHARMACY RECIPIENT** record to inform which COVID-19 vaccine product the Recipient should receive

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Tips

The **PHARMACY RECIPIENT** record will indicate which pharmacy administered the vaccine, as well as the Vaccine Manufacturer Name, date of vaccination, and other relevant information.

Step 5 of 5: Other Considerations

1. If the Recipient has no record in CVMS, refer to the **EXCEPTION 1** portion of this User Guide to create their CVMS Recipient record and register them on-site. Then follow the standard **APPOINTMENT WALK-IN** Booking process

2. If the Recipient has a record in CVMS, but is not registered, refer to the **EXCEPTION 2** portion of this User Guide to conduct on-site registration. Then follow the standard **APPOINTMENT WALK-IN** Booking process

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Tips

Keep a tab open with the **PHARMACY RECIPIENT** record when administering the second dose of the COVID-19 vaccine, since it will not appear in the **FIRST DOSE DETAILS** section of the Vaccine Administration details.

Cancelling an Existing Appointment

Step 1 of 5: Search for the Recipient

The process to cancel an existing appointment for a Recipient begins on the **APPOINTMENTS** tab.

1. Navigate to the **APPOINTMENTS** tab

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Tips

Cancellation is only required if a Recipient refuses a Vaccine after being booked for an appointment, or if you booked an appointment by mistake.

If a Recipient needs to change their appointment date, the Provider only needs to re-book the appointment through the Appointment Walk-In tool, and the appointment date will update.

1. You can use the **SEARCH APPOINTMENTS** field to search for the Recipient by **NAME**

2. Set the **FROM** and **TO** fields to include the date of the appointment that needs to be cancelled (the field will default to the current date)

3. Click **SEARCH**

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Step 3 of 5: Confirm the Appointment to Cancel

After clicking search, the existing **APPOINTMENTS** will populate underneath the Appointments List View.

1. Locate the correct **RECIPIENT** who needs an appointment cancelled

2. Verify the Recipient's identity

3. Select the checkbox to the left of the Recipient's name

4. Select the **CANCEL APPOINTMENT** button

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Selecting the **CANCEL APPOINTMENT** button will initiate a pop-up window to appear on the screen.

1. Input a **CANCELLATION REASON**
2. Select the **CANCEL APPOINTMENT** button

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Healthcare Provider

Healthcare Location Manager

Step 5 of 5: Confirm the Appointment is Cancelled

The Recipient should no longer have their appointment booked. If the Recipient's appointment was for today, the Recipient should no longer appear on the **TODAY'S APPOINTMENTS** tool.

Audience

Healthcare Provider

Healthcare Location Manager

View Appointment / Cancellation History

To view a record of a Recipient's appointment history, navigate to the Recipient tab, locate the Recipient's record, and select **RELATED** tab. The Recipient's appointment records will appear. Selecting an appointment record will bring up the details of that appointment, including a **CANCELLATION REASON** if applicable.

Audience

Healthcare Provider

Healthcare Location Manager

Understanding How Recipient Eligibility Status is Determined

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How the Priority Tier Group is Determined

Since there initially is a very limited supply of COVID-19 vaccines, **North Carolina has implemented a risk-based prioritization approach** based on guidance from the National Academy of Medicine, the CDC's Advisory Committee Immunization Practice, and the NC Institute of Medicine.

The NC population is divided into multiple Priority Tier groups based on an individual's **OCCUPATION, AGE,** and **RISK LEVEL.**

When answering the COVID-19 Vaccination (Health) Questionnaire, the Recipient will provide multiple inputs that will determine their Priority Tier group:

- **OCCUPATION** will be determined by the **EMPLOYER** or the **INDUSTRY** that the recipient identifies as their primary business, and by the answer to the question **DO YOU IDENTIFY AS ANY OF THE FOLLOWING** (e.g., Student, Frontline Essential Worker, Resident of Long-term Care Facility).

- Age will be determined by the **DATE OF BIRTH**

- Risk Level will be determined by the **NUMBER OF MEDICAL HEALTH CONDITIONS**

Note that the other answers are important as well to study the demographics of the recipients and inform future potential adjustments to accelerate the vaccination of populations identified as more vulnerable.

Note: Eligibility requirements may be adjusted in the future by the NC Immunization Branch.

Visit https://covid19.ncdhhs.gov/findyourspot **for the latest information.**

Appendix

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When the Recipient is NOT Eligible for the COVID-19 Vaccine

When you verify **RECIPIENT ELIGIBILITY**, and the Recipient is **NOT APPROVED**, you are still able to **CREATE THE APPOINTMENT BOOKING** and **ADMINISTER THE COVID-19 VACCINE** if you assess the Recipient's situation and determine they do meet current Eligibility criteria.

1. From the home page, go to the **RECIPIENT TAB**

2. Search for the Recipient in the **ALL RECIPIENTS LIST VIEW**

3. Click the **RECIPIENT NAME**

4. Click on **DETAILS** to review the Recipient's responses to the **COVID-19 VACCINATION (HEALTH) QUESTIONNAIRE**

Audience

Healthcare Provider

Healthcare Location Manager

Tips

If the Recipient informs you that their health information is **NOT CORRECT**, ask the Recipient to **UPDATE** their information (e.g., responses to COVID-19 Vaccination (Health) Questionnaire) in the **CVMS RECIPIENT PORTAL.**

You will **NOT** be able to **EDIT** the Recipient's profile.

If the recipient is unable to edit their registration information, please contact the CVMS Help Desk for assistance.

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Additional Notes

Key Items:

- **Hyperlink**s appear as light blue and will provide additional information or navigation.

- *** Asterisks** are used to denote required information.

- A Toggle can be clicked to see selectable options.

- A Pen can be clicked to make edits to the field.

- Navigation Buttons can be clicked on to progress to the "next" or the "previous" step in a task.

- A Pause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return/ login.

Contact Information:
- All questions should be directed to https://ncgov.servicenowservices.com/csm_vaccine.

Supported Web Browsers:
- Please use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers to access CVMS.
- For more information on supported browsers, see **https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5**
- Note: Internet Explorer and Edge (Non-Chromium) are not supported.

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User Guide Change Log

Key Items:

- **Date of Change:** Date that any updates were made to the User Guide
- **Changes Made:** Summary of the updates made within the User Guide
- **Impacted Slides:** Specific slides that were updated or changed
- **Author:** The user that made the updates to the User Guide

Version	Date of Change	Changes Made	Impacted Slides	Author
1	12/1/2020	• Initial document		Azalea Troche
2	12/18/2020	• Added Create Recipient, Register Recipient sections, updated Process Flow, added Generic Employer List, eligibility criteria	• 7, 13-14, 15-37, 40	Steve DiGangi
3	1/15/2021	• Updated instructions for Creating Recipient • Updated Screenshots • Updated instructions for Appointment Booking (select a location) • Updated Understanding How Recipient Eligibility Status is Determined Section • Removed any mention of the 2 CVMS Help Desk emails. Added CVMS Help Desk Portal information • Added "What to do if a Recipient received their first dose through a LTC/Pharmacy" section • Added Cancelling an Existing Appointment Section	• 1, 2, 13, 19, 23, 32, 35-40, 41-47	Steve DiGangi Courtney Seward

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